

### CONSULTANT QUESTIONNAIRE

1. List the name, address and telephone number of the firm making the proposal; name, address and telephone number of the person with the firm to serve as contact person in reference to the proposal.
2. Provide the following information on your firm:
  - A. A brief history of the firm including year of origination, ownership, affiliated companies and relationships.
  - B. A description of the firm including number and location of offices, number of professional actuarial staff including their educational and professional backgrounds, and scope of services provided.
  - C. Name, office location, and resume of the individual(s) with the firm who will be directly responsible for servicing the Firefighter's Retirement Plan; their role and the scope of their involvement; and all other responsibilities assumed by them.
  - D. List the names of five (5) major retirement plans (involving 1,000 or more participants) with emphasis on public plans for whom you perform actuarial consulting services. Give name and title of person(s) responsible for administration of such retirement programs, address, and telephone number for reference purposes.
  - E. Based upon your review of the material provided and the services requested, state your annual charges during the length of the contract.

- F. It is the intention that this Request for Proposals covers all essential items of service. If you find something essential omitted, indicate the specific service(s) in your commentary and also state whether or not such service(s) is included in your fee.
- G. If you propose additional services such services should be outlined and separately priced.
- H. Indicate your hourly time charges for actuarial and consulting services not included within the scope of the routine services delineated herein.
- I. Based on the material provided, briefly critique the plan, its funding, assumptions and cost methods. Offer any suggestions you might wish to make with respect thereto.
- J. Number of new accounts acquired and number of accounts lost in each of the years 2008 through 2013.
- K. Describe any educational materials provided to clients and seminars sponsored by your firm.
- L. Briefly describe the characteristics of your actuarial consulting approach which makes your organization unique.
- M. The response should include the extent of minority and women participation in the firm, in ownership, partnership and professional employment and support personnel.

- N. All firms must state that they do not discriminate against any employee or applicant for employment because of race, color, national origin, ancestry, religion, age, sex or sexual orientation, gender identity or expression, genetic information, marital status or retaliation. All firms must also state compliance with the American Disability Act and Patriot Act.
- O. Accurately describe any potential clause that may serve to limit the firm's potential liability to the Plan, its participants, and beneficiaries.
- P. In the interest of financial disclosure, describe any City of St. Louis campaign contributions made by your firm, its officers, or employees that would be responsible for work if awarded the contract.
- Q. Please provide information as to the existence of any past or present litigation regarding adequacy of services to previous clients.